Client Briefcase User Guide (Importing)

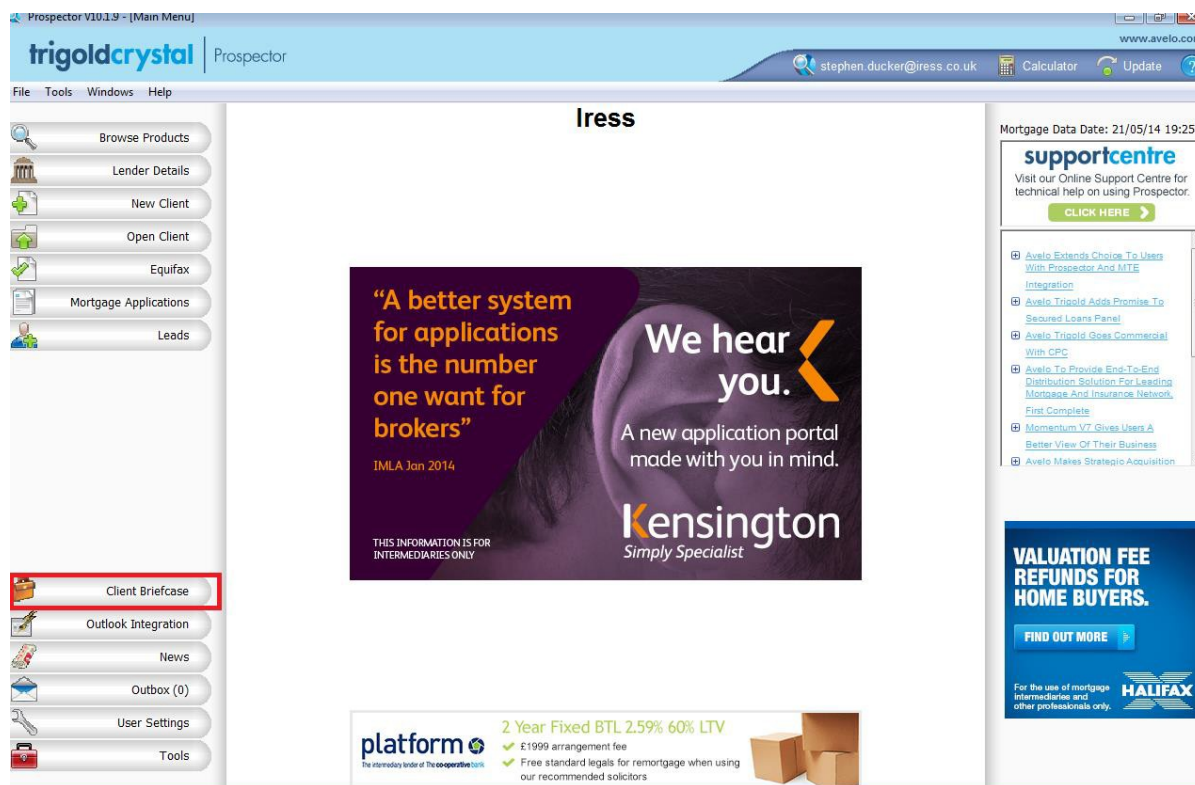1. Launch Trigold.
2. Click on the Client Briefcase button.

3. Click on the Import from Client Briefcase button.
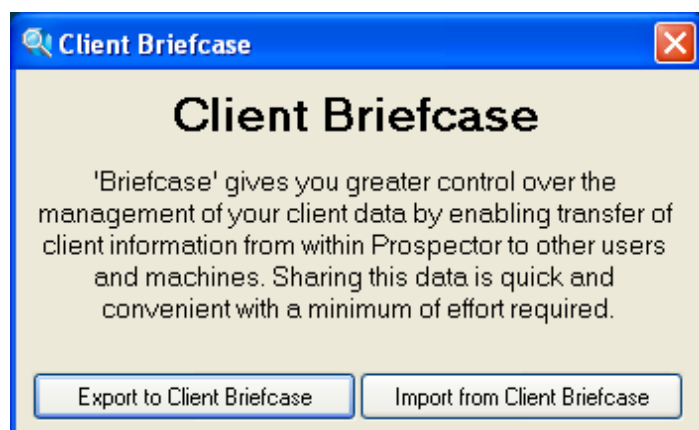
4. Select the type of client briefcase file you wish to import from either your email or hard drive and then click on the OK button.
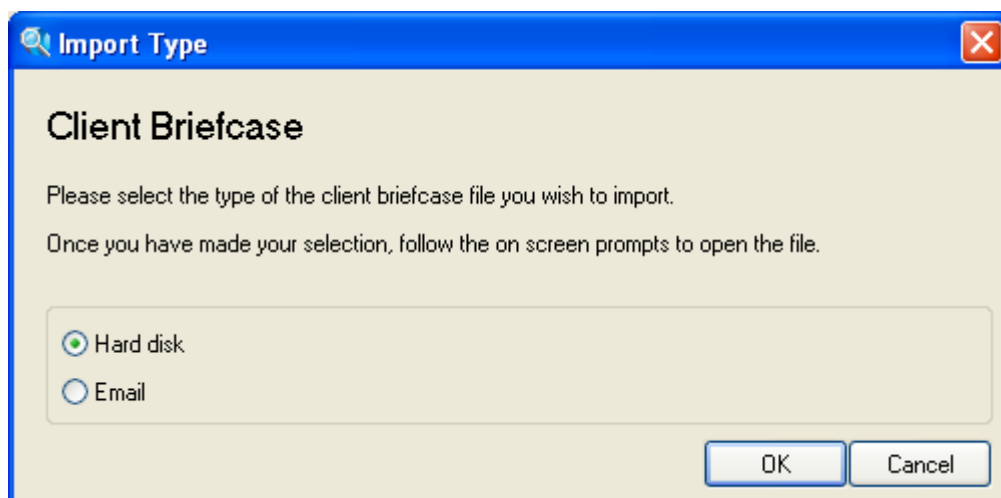
5. Browse to where the export.tcd is located and then click on the Open button.

6. Ensure any clients that you wish to transfer have a tick against them which is located in the Import column and then click on the Import button.
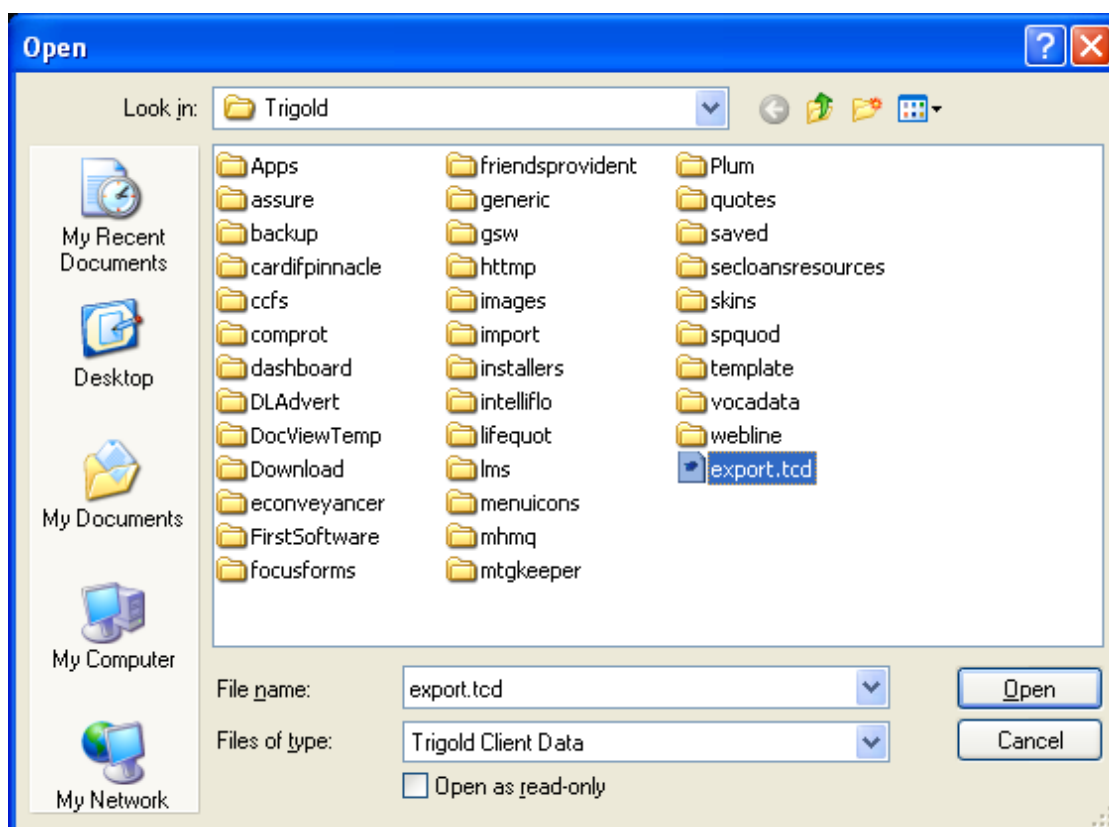
7. If you wish to include all associated documents and applications for the selected clients, ensure that both the Include documents with import and Include applications with import are ticked. Click on the OK button to continue.

8. If the message 'A duplicate record already exists, do you wish to overwrite this existing date' and you do not wish to overwrite the existing client in the database, click on the No to All button. If you click on the Yes to All button and duplicate clients will be overwritten.

Duplicate Reference Exists

A duplicate record already exists, do you wish to overwrite this existing data [Ref = Test101, time_stamp = 222338183]

Yes	Yes to All	No	No to All

9. Once the data has successfully imported, the following message will appear:

Import success ✕

Data has been successfully imported

OK

10. Click Close on the Import screen to re-launch Trigold.

Client Briefcase (import)

Broker Name: N/A
Company Name: 123
Company Postcode: W8 4PL

Import	Reference	Name	Date	Recall Date	Property Postcode	Lender Nam
☐	Test101	John Smith	18/01/2008	28/02/2011		Britannia B.

Check Selected	Check All		Import	Close
Uncheck Selected	Uncheck All			